

## PA and OM Workflow Report

You may access the PA and OM Workflow Reports by entering one of the following Transaction codes in the Command field.

- For PA, enter **zpa0189**.
- For OM, enter **zom0178**.

The requested Workflow Report is displayed. See the examples below of the PA and OM Workflow Report screens.

### PA Workflow Report

The screenshot shows the 'PA Workflow Report' selection screen. It has a blue header with a clock icon. Below the header, there are four main sections: 'Selection', 'Additional data', 'Output options', and a vertical stack of four yellow arrow buttons on the right. The 'Selection' section contains a 'Personnel number' field with a yellow background and a magnifying glass icon. The 'Additional data' section contains four rows of fields: 'Action Type', 'Personnel area', 'PCR ID', and 'PCR WF Approval Level'. Each row has a 'to' field and a yellow arrow button. The 'Output options' section contains an 'ALV Layout variant' field.

PA Workflow Report	
<b>Selection</b>	
Personnel number	
<b>Additional data</b>	
Action Type	to
Personnel area	to
PCR ID	to
PCR WF Approval Level	to
<b>Output options</b>	
ALV Layout variant	

### OM Workflow Report

The screenshot shows the 'OM Workflow Report' selection screen. It has a blue header with a clock icon. Below the header, there are four main sections: 'Selection', 'Additional data', 'Output options', and a vertical stack of four yellow arrow buttons on the right. The 'Selection' section contains a 'Position ID' field with a yellow background and a magnifying glass icon. The 'Additional data' section contains four rows of fields: 'Action', 'Personnel area', 'PCR ID', and 'PCR WF Approval Level'. Each row has a 'to' field and a yellow arrow button. The 'Output options' section contains an 'ALV Layout variant' field.

OM Workflow Report	
<b>Selection</b>	
Position ID	
<b>Additional data</b>	
Action	to
Personnel area	to
PCR ID	to
PCR WF Approval Level	to
<b>Output options</b>	
ALV Layout variant	

## WORKFLOW REPORT SEARCH CRITERIA

The Workflow Reports can only be run for those entities for which you have security. You can run the report for your entire agency *if* you have that security access. The Workflow Report can also be run for smaller groups or for an individual PCR.

### DATA SEARCH OPTIONS

For **PA** you can search by:

- Personnel number
- Action type
  - Use the drop-down menu to select the actions type.
- Personnel area
  - For those for which you have security access
- PCR ID (if you know it)
- PCR WF Approval Level
  - Use the drop-down menu to select the workflow approval levels.

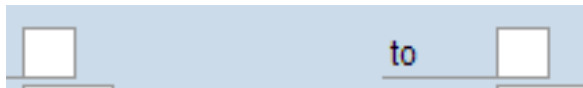
For **OM** you can search by:

- Position ID
- Action
  - Refer to the **OM Position Actions Job Aid** located on the BEACON University Help website for a list of the available options for this field.
- Personnel area
  - For those for which you have security access
- PCR ID (if you know it)
- PCR WF Approval Level
  - Use the drop-down menu to select the workflow approval levels.



### Multiple Selection icon

In the Selection and the Additional Data sections you can perform the search using multiple selection criteria to broaden your output.



### Data Range fields


In the Additional Data section you can perform search using individual data or even a range of data.



### Variant List field

You can also create and run ALV Layout Variants. This job aid will explain how to set up your ALV Layout Variant later in the document.

## EXECUTING THE WORKFLOW REPORT

1. Determine the search criteria data needed for your report.
2. Enter the data in the various fields.
3. Click  (Execute) to perform the search.

Here is an example of a report using the following data search criteria:

- Actions **Z1 to Z6**
- Personnel area **4601**

**PA Workflow Report**




**PA Workflow PCR List**

Agency	Action Type	Name of reason for action	WF Approval Lvl	PCR ID	Pers. No.	Act.	Start date	SSN(K
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005167	80000751	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005166	80000750	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005165	80000749	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005164	80000748	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005163	80000747	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005162	80000746	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005161	80000745	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005151	80000735	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005152	80000736	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005153	80000737	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005154	80000738	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005155	80000739	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005156	80000740	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005157	80000741	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005158	80000742	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005159	80000743	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005160	80000744	Z1	06/30/2008	
Cultural Resources	Suspension (NC)	Unsatisfactory Performance	Agency Approval	1000005201	80000845	Z6	06/27/2008	
Cultural Resources	Suspension (NC)	Unsatisfactory Performance	Agency Approval	1000005202	80000846	Z6	06/27/2008	

## MANAGING THE LAYOUT VIEW



Layout Management Options:

-  Change layout icon
-  Select layout icon
-  Save layout icon

## EXECUTING, CHANGING, AND SAVING THE LAYOUT OF A REPORT

The following actions will be demonstrated in this section:

- How to search for PA Actions Z1 to Z6
- How to search in Personnel area 4601
- How to execute the report
- How to change the layout
- How to save the layout as a variant

1. Type **ZPA0189** in the Command field and press Enter to access the PA Workflow Report.

**NOTE:** Use **ZOM0178** for the OM Workflow Report.

**PA Workflow Report**

**Selection**

Personnel number

**Additional data**

Action type	z1	to	z6	
Personnel area	4601	to	<input type="text"/>	
PCR ID	<input type="text"/>	to	<input type="text"/>	
PCR WF Approval Level	<input type="text"/>	to	<input type="text"/>	

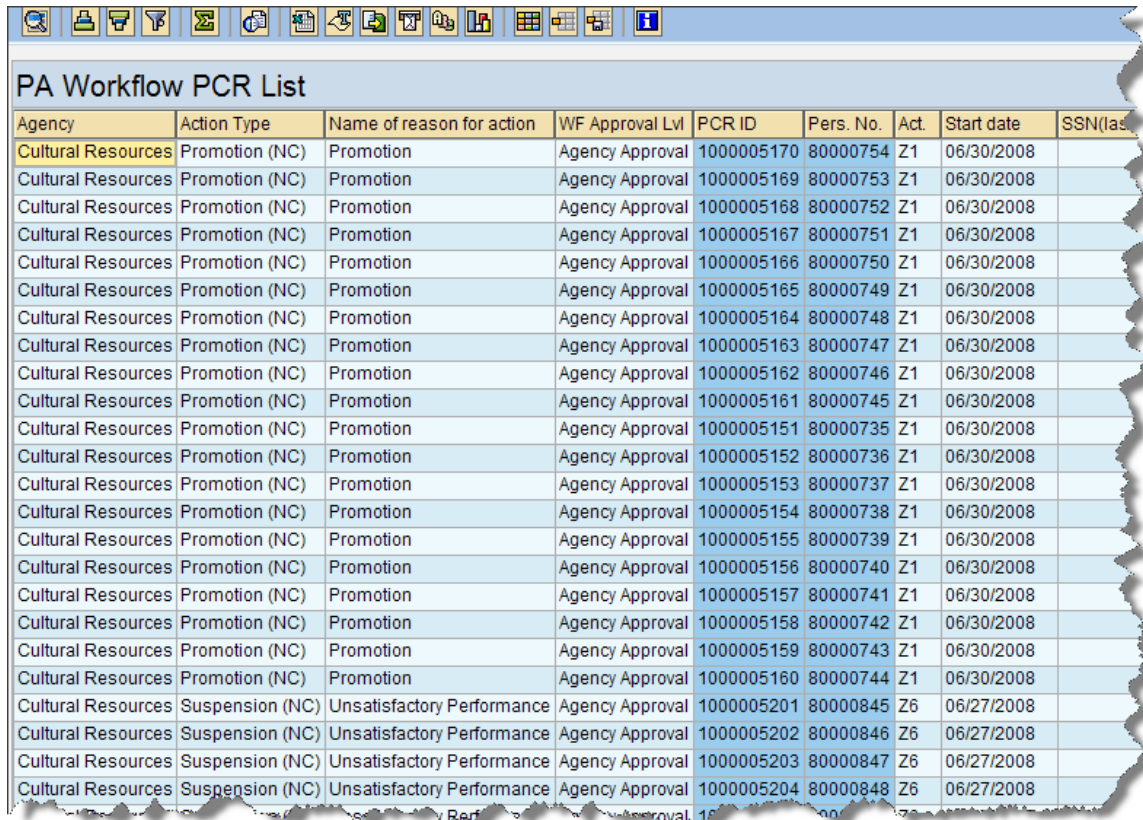
**Output options**

ALV Layout variant

2. Enter your search criteria in the fields of your choosing in the **Selection** and **Additional data** sections of this screen.

**NOTE:** You will only see what your system security will allow you to see.

3. Click the **Execute** button.



Agency	Action Type	Name of reason for action	WF Approval Lvl	PCR ID	Pers. No.	Act	Start date	SSN(las
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005170	80000754	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005169	80000753	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005168	80000752	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005167	80000751	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005166	80000750	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005165	80000749	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005164	80000748	Z1	06/30/2008	
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Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005161	80000745	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005151	80000735	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005152	80000736	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005153	80000737	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005154	80000738	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005155	80000739	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005156	80000740	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005157	80000741	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005158	80000742	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005159	80000743	Z1	06/30/2008	
Cultural Resources	Promotion (NC)	Promotion	Agency Approval	1000005160	80000744	Z1	06/30/2008	
Cultural Resources	Suspension (NC)	Unsatisfactory Performance	Agency Approval	1000005201	80000845	Z6	06/27/2008	
Cultural Resources	Suspension (NC)	Unsatisfactory Performance	Agency Approval	1000005202	80000846	Z6	06/27/2008	
Cultural Resources	Suspension (NC)	Unsatisfactory Performance	Agency Approval	1000005203	80000847	Z6	06/27/2008	
Cultural Resources	Suspension (NC)	Unsatisfactory Performance	Agency Approval	1000005204	80000848	Z6	06/27/2008	

4. Click the **Change layout** icon . A pop-up box is displayed.

There are five tab options on the Change Layout box.

- **Displayed Colu tab**– Displays the fields included on the current report. If you want a different layout, you can adjust your display by moving the columns to the right column to “hide” them from the display.



Highlight an item in the **Displayed Columns** list and move it to the **Column set** list



Highlight a **Column set** item and move it to the **Displayed Columns** list



Move the highlighted item up in the order (moves the column to the left on the report)



Move the highlighted item down in the order (moves the column to the right on the report)








Move the highlighted item to the top of the list (to the left of the report)

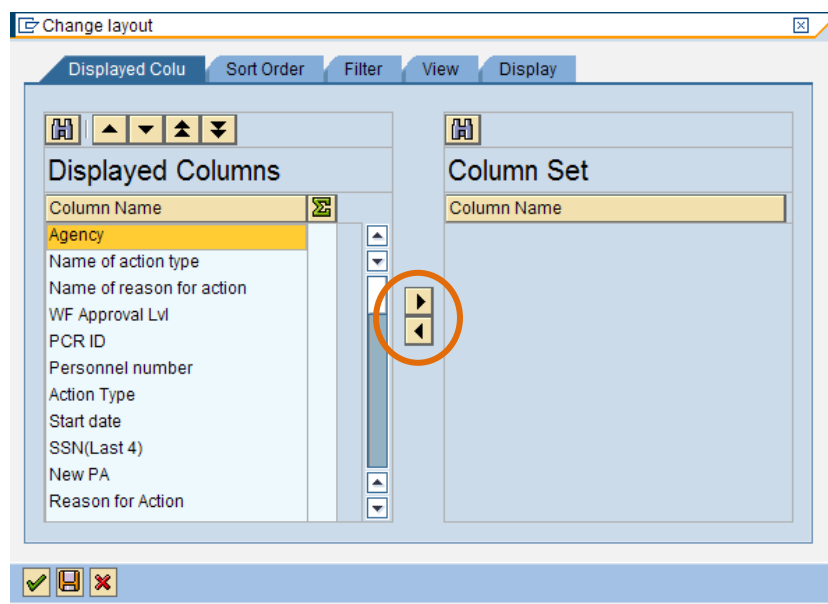


Move the highlighted item to the bottom of the list (to the right of the report)



Helps to search for a field

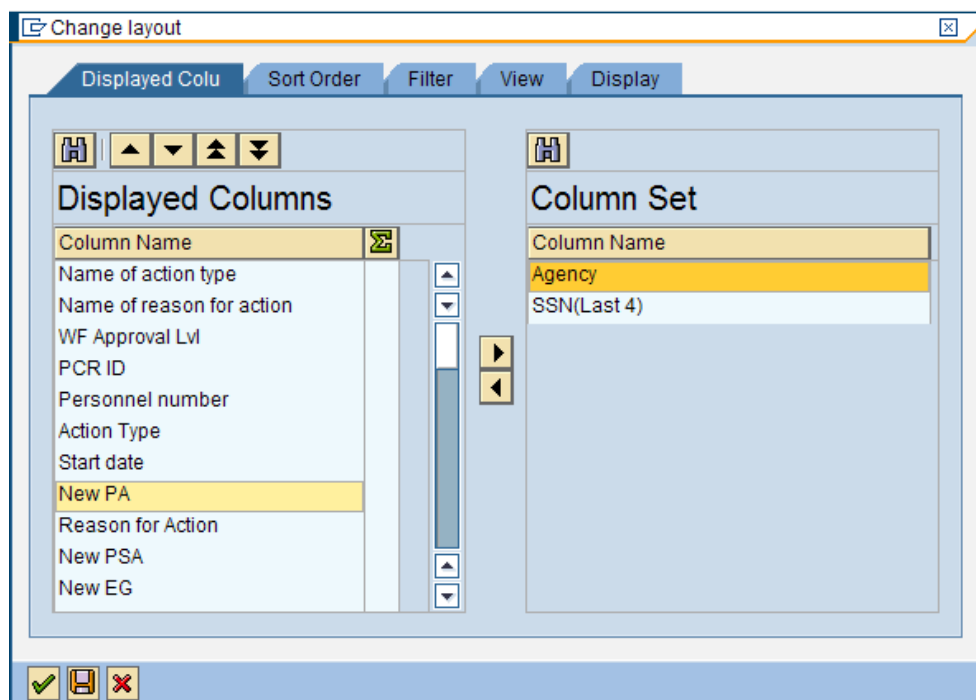
- **Sort Order tab** – Displays the currently sorted fields on the left and the set of available fields on the right. (also available under the **Sort** buttons   ).  
 Ascending order filter  
 Descending order filter
- **Filter tab** - The fields currently filtered on are shown on the left, the set of available fields are shown on the right (also available under the filter button  ).
- **View tab** - allows the user to choose various data views
- **Display tab** - allows various data views



5. Select any columns you do not wish to see on this report by highlighting the column name in the Displayed Columns list and either double-clicking or clicking the Hide selected columns button




located in between the column sets.



6. Once you have selected which columns you do not wish to see, click on the green check mark at the bottom left of the pop-up box. The report redisplay with the column set you have selected.
7. You may wish to rearrange the order of the columns as they are displayed. Position your mouse over the top of the column you wish to move until the cursor changes to a dark down arrow. Single-click to highlight that column. In the following example we have highlighted the Act. Column.
8. Position your cursor over the title of the column and drag it to where you want it to display. A red line will indicate when you are where you want the column to be moved. Release the mouse and your column will move to that position.

PA Workflow PCR List						
Action Type	Name of reason for action	Act.	WF Approval Lvl	PCR ID	Pers. No.	Start date
Promotion (NC)	Promotion	Z1	Agency Approval	1000005170	80000754	06/30/2008
Promotion (NC)	Promotion	Z1	Agency Approval	1000005169	80000753	06/30/2008

In the preceding example, note that we have moved the **Act. column** to follow the **Name of reason for action** column.

9. Click the **Save layout** icon  to save this layout to display each time you run this report. The Save layout pop-up box is displayed.



Layout	Layout description	Default setting
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Save layout: /

Name:

☐ User-specific ☐ Default setting

10. Enter a short description in the **Save layout:** field to identify the layout design.

**NOTE:** If you want this layout to be user-specific, you must begin the layout name with a **Z**.

11. Enter a more descriptive name for the layout in the **Name:** field.

12. Check the **User-specific** checkbox if you want this layout design to be restricted to your user ID.

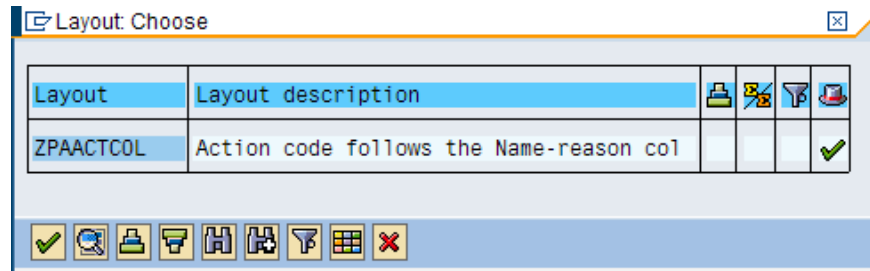
**NOTE:** If you do not check the User-specific box, the layout will be available to all who have security to run this report. It can also be changed by anyone with security access to this report.

13. When you have completed entering the fields on the Save layout box, click the green check mark in the lower left hand corner of the box to save your layout design.


You have just created an ALV Variant layout.

## RETRIEVING AN ALV VARIANT LAYOUT OF A REPORT

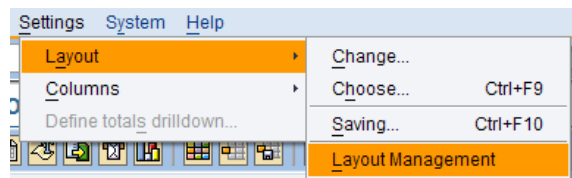
1. To retrieve an ALV Variant for a report, complete the search criteria fields in the **Selection** and **Additional data** sections of the report screen.
2. Click on the matchcode in the **ALV Variant** field. The **Layout: Choose** pop-up selection box is displayed showing any preset variants.



3. Click on the layout you wish to see and click Execute to run the report. The report will display with the applied variant layout.

- If you forget to select the variant prior to executing the report, you can still apply it once you are in the report by clicking on the **Select layout** icon . The **Choose layout** selection box is displayed with the available options. Click on the layout you wish to see. The layout is then applied.
- If you want to change the current view to another view, you can also do that by using the **Select layout** icon to apply that view in the current report.
- You can set the default layout view by accessing the following menu path:

*Settings > Layout > Layout Management*



- You can select the default setting you want to display each time your report is run. Do this by clicking in the **Default setting** field next to layout you choose.

### Layout: Management

